



13 August 2020

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

Re: The Broker's Workstation and The Underwriter's Workstation – Important Releases and Changes

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [Improved PDF Viewer in TBW/TUW](#) – PDF documents in TBW/TUW will now be opened and viewed in the improved PDF viewer. With the new PDF viewer, PDF documents can be viewed, searched, annotated, printed, and more, as required.
2. [Account Rep Details in Expiry Report](#) – The Expiry Report has been updated with additional columns providing details about the most recent Account Representative and the effective date for their assignment to the policy. These added columns will be included when the report is exported to Microsoft Excel, but not when the report is printed.
3. [Account Rep Details in Production Report](#) – The detailed Production Report now includes additional columns that will display the Account Representative effective on the computer date the report is run, as well as the effective date for their assignment to the policy.
4. [Pending Payments Optimization](#) – Several enhancements have been made to the Accounts Payable Pending Payments feature to optimize speed and improve data integrity.

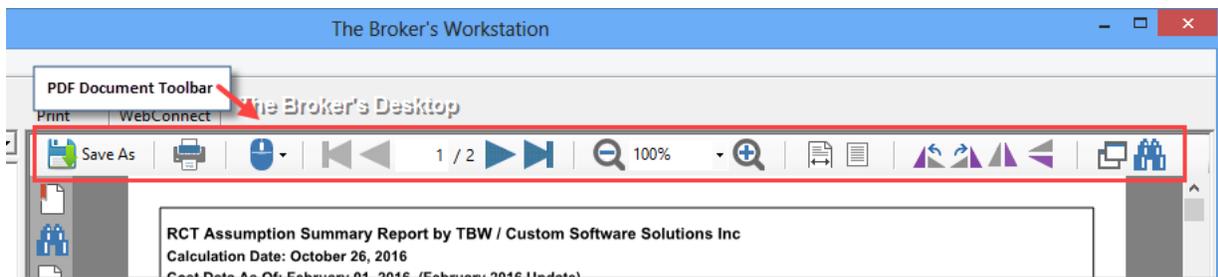
5. [Storage of Completed Print Jobs](#) – Completed print jobs will now be stored for seven days in the print queue in TBW Print Manager, and any print jobs older than seven days will automatically be removed from the print queue and the TBW/TUW database.
6. [TBW/TUW Now Only Available Online](#) – Please be aware that TBW/TUW is now only available online and all TBW/TUW functions now rely on direct database connection.

1. Improved PDF Viewer in TBW/TUW

PDF documents in TBW/TUW will now be opened and viewed in the improved PDF viewer. With the new PDF viewer, PDF documents can be viewed, searched, annotated, printed, and more, as required. The enhanced PDF viewer is available for all PDF documents viewed within TBW/TUW, including persisted documents, imported PDFs, downloaded Dec pages, Certificates of Insurance, and PDFs viewed in the Preview Pane on the Documents tab in Folder Details.

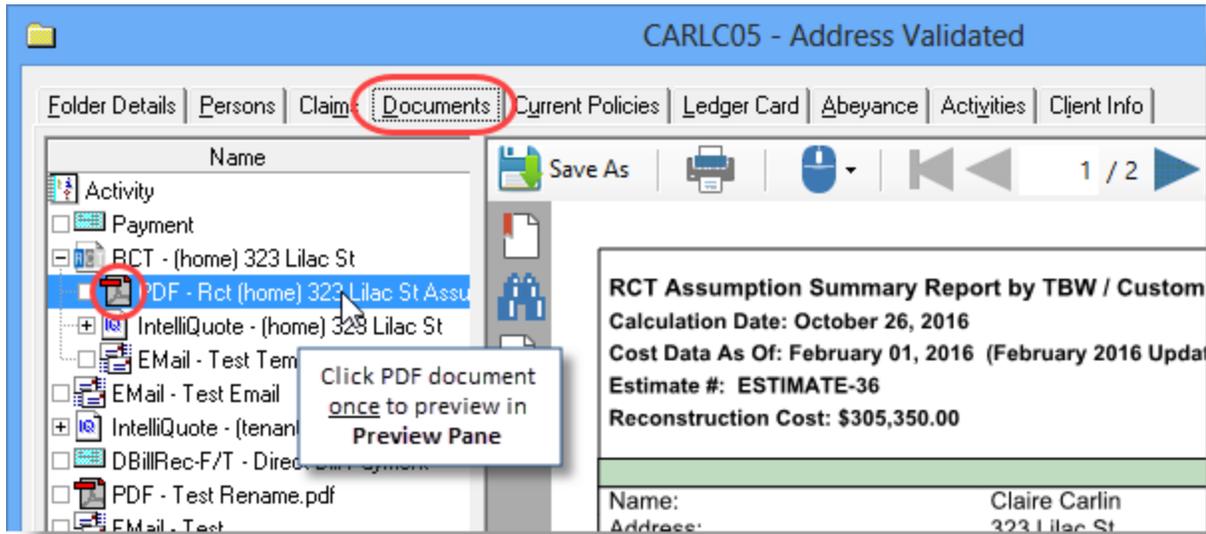
To view the enhanced PDF viewer, open any PDF document in the Document Window in TBW/TUW. The **PDF toolbar** at the top of the document provides easy access to common document tasks (see Figure 1.1).

(Figure 1.1)



The new PDF viewer is also available when a PDF document is viewed in the **Preview Pane** on the Documents tab in Folder Details. In the list of documents, click a PDF document once to preview it in the Preview Pane on the right side of the window (see Figure 1.2).

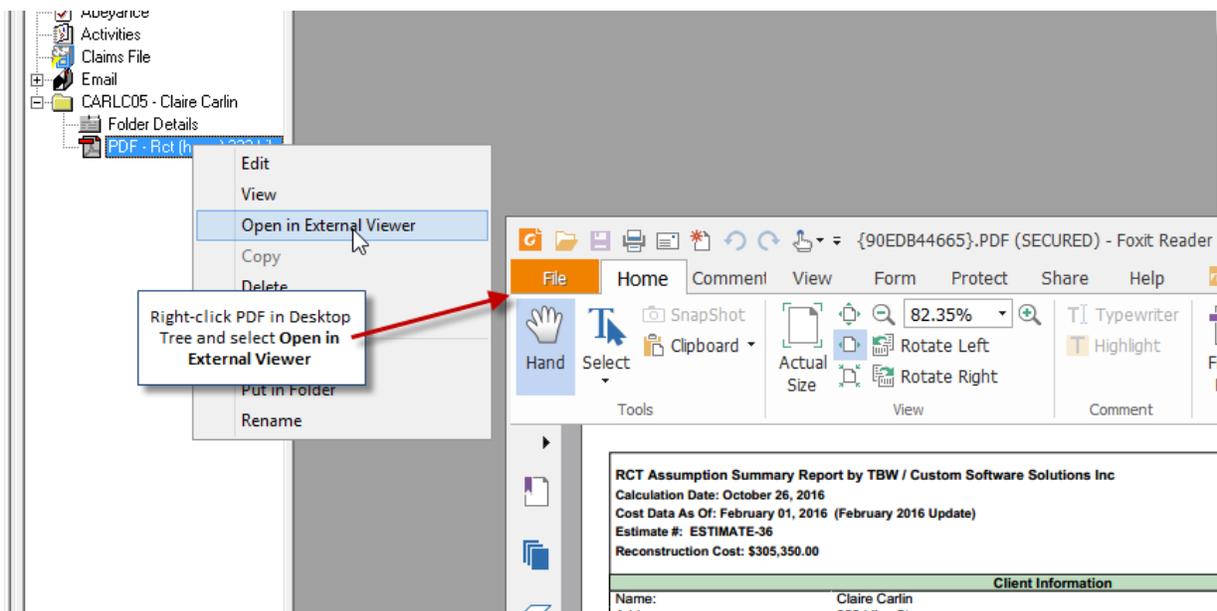
(Figure 1.2)



Please note, when a PDF document in TBW/TUW is opened in its own external window, it will continue to open and display in your usual external PDF reader application (see Figure 1.3).

- To open a PDF in an external window from the Desktop Tree, right-click the PDF and select **Open in External Viewer**. To open a PDF in its own window from the Documents tab in Folder Details, right-click the document and select **View/Open**.

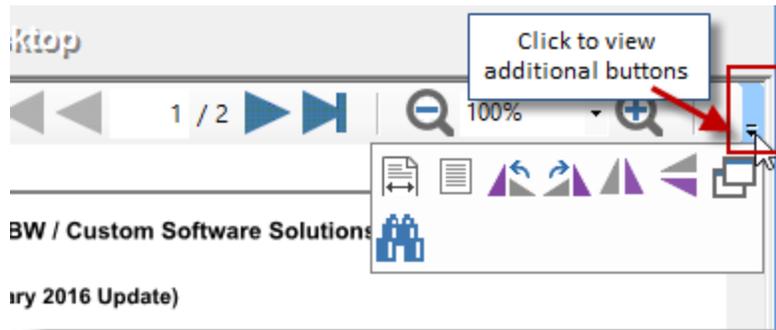
(Figure 1.3)



PDF Viewer Toolbar

With the improved PDF Viewer, the PDF toolbar at the top of the document provides quick and easy access to common document tasks. If some toolbar buttons are not visible, click the arrow at the end of the toolbar to view additional buttons (see Figure 1.4).

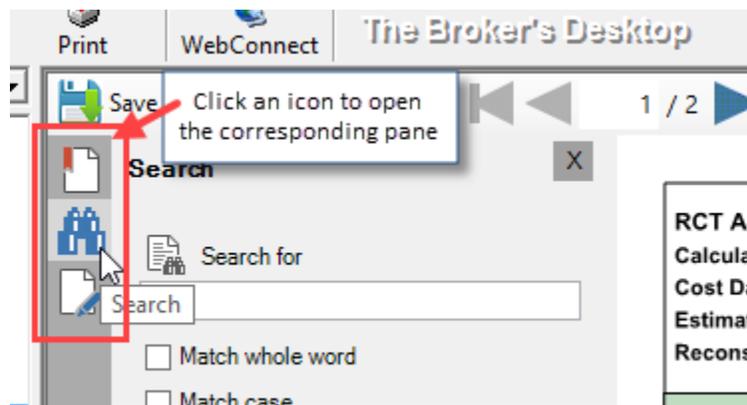
(Figure 1.4)



Additional document options are available using the **Bookmarks**, **Search**, and **Annotations** icons along the left side of the document. Click one of these icons to open the corresponding pane and perform various tasks (see Figure 1.5).

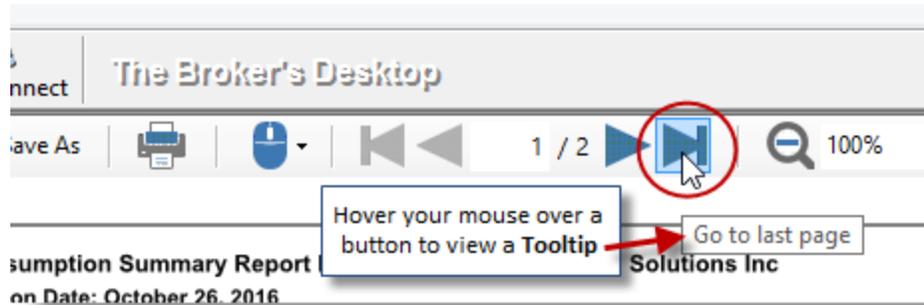
- When you are ready to close the pane, click the **Close**  button in the upper right corner of the pane.

(Figure 1.5)



Hover your mouse over a button/icon to view a tooltip indicating its corresponding action (see Figure 1.6).

(Figure 1.6)



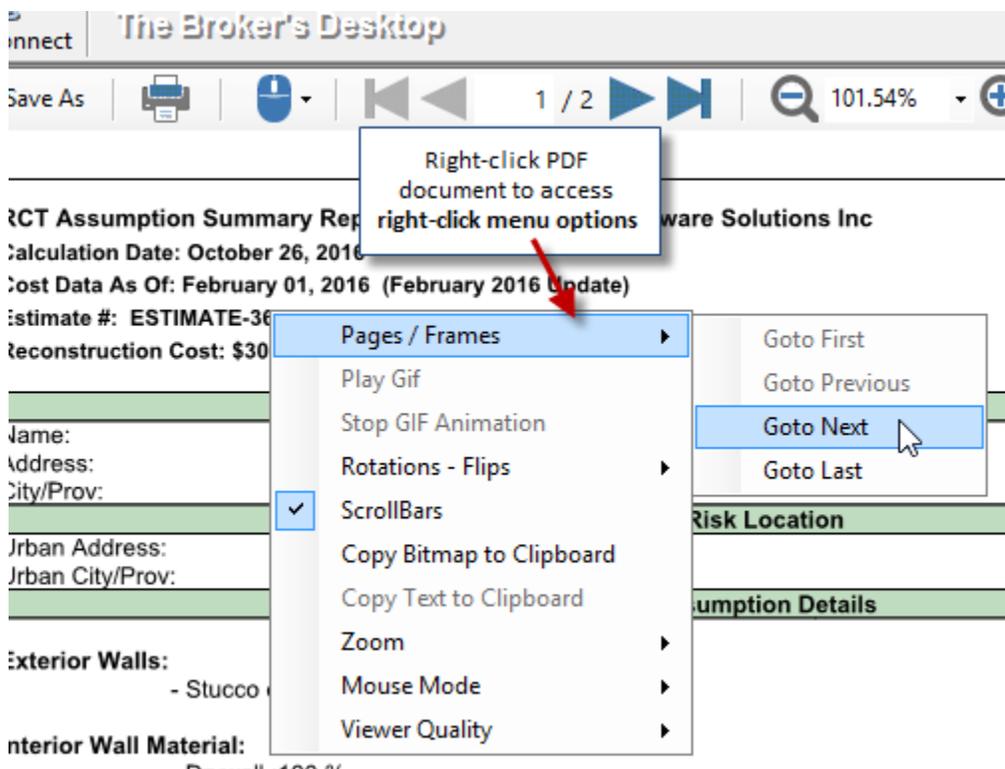
Here are the document buttons/icons and their corresponding actions:

Button / Icon	Action
 Save As	Click Save As to save an internal or external copy of the PDF document (creating a new file and leaving the original file unchanged)
	Print the document (in the Print dialog that displays, enter/select printer and printing preferences)
	Select the Mouse mode from the drop-down menu (options include <i>Default, Area Selection, Pan, Area Zooming, and Magnifier</i>)
	Go to first page of the document
	Go to previous page of the document
1 / 2	Displays Page of # of Pages . Enter the desired page number to go directly to that page in the document.
	Go to next page of the document
	Go to last page of the document
	Zoom Out
<input type="text" value="100%"/>	Enter or select the desired Page size
	Zoom In
	Adjust the document size to Page width
	Adjust the document size to Whole page
	Rotate the page Left
	Rotate the page Right
	Flip the page Vertically

	Flip the page Horizontally
	Pop out the document from the TBW/TUW Document Window, and view it in its own window (the document will still be available in the Document Window)
	Search the document for a target character, word, or phrase
	Open the Bookmarks pane and access a list of document bookmarks
	Open the Search pane and perform an advanced document search
	Open the Annotations pane and mark/add notes to the document with highlighting, text, graphics, lines, and more

Various document options (including some of the toolbar options) can be accessed using the right-click menu. When you right-click the PDF document, choose the target selection from the menu (see Figure 1.7).

(Figure 1.7)

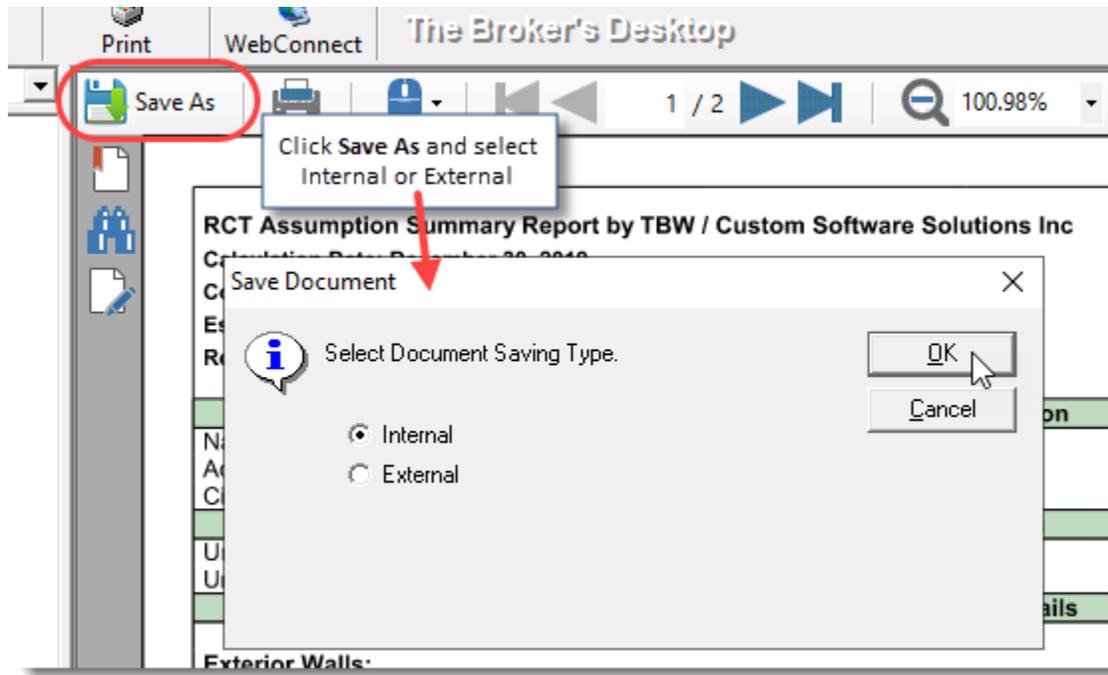


Save a PDF Document Internally or Externally

Click the **Save As**  button on the PDF toolbar to save a copy of the PDF document (creating a new file and leaving the original file unchanged). A document can be saved internally (i.e. in TBW/TUW) and/or to an external location.

When you click the **Save As** button, the **Save Document** pop-up will display. Select to save an Internal or External copy of the document and click OK (see Figure 1.8).

(Figure 1.8)



When saving internally, you will be prompted to add a descriptive file name, and the file will be saved automatically to the current folder. When you save the PDF externally, you will be prompted to enter a descriptive file name and select the location to save the file.

Copy and Paste Selected Content to Another Location

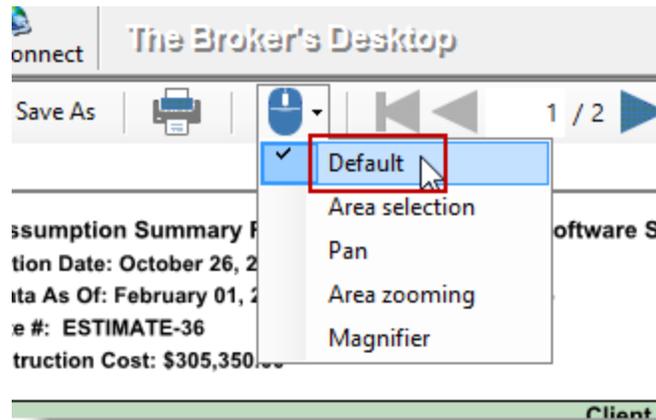
If required, content in the PDF document can be copied and pasted to another location, such as an internal (TBW/TUW) or external word processing document. You can choose to copy/paste the selected content as text or in graphic format.

Copy and Paste Selected Text to Another Location

To copy and paste selected text to another location,

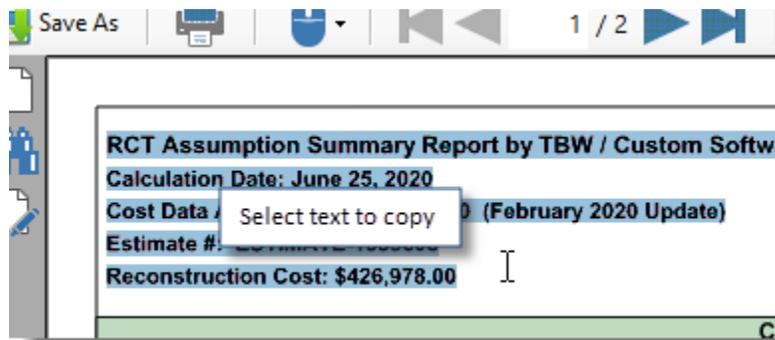
- a. In the **Mouse Mode** menu on the document toolbar, select **Default** (see Figure 1.9).

(Figure 1.9)



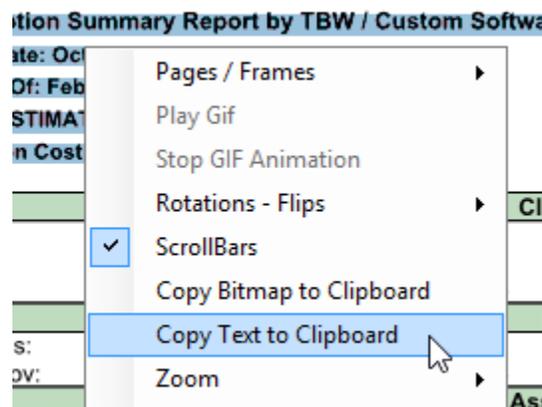
- b. Select the text to be copied (see Figure 1.10).

(Figure 1.10)



- c. Right-click the selected text and click **Copy Text to Clipboard** in the right-click menu (see Figure 1.11).

(Figure 1.11)



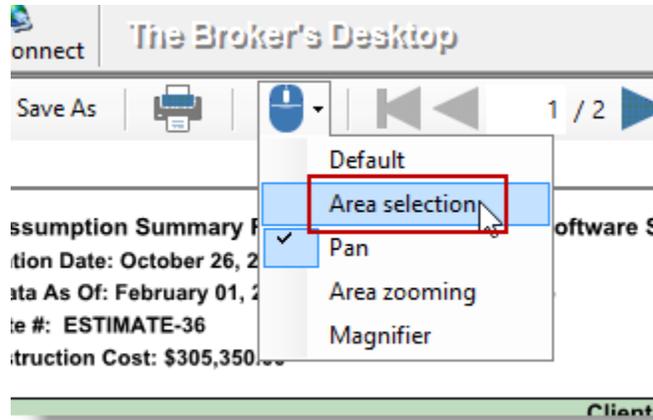
- d. Move to the document where you will be pasting the copied text, and paste using the right-click option or the Paste function on the document menu bar.

Copy and Paste Selected Content in Graphic Format

To copy and paste selected content in graphic format,

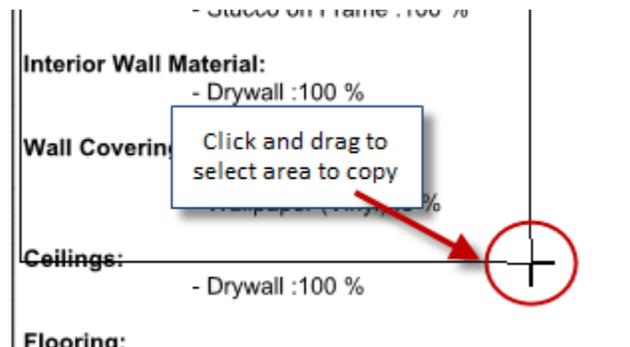
- a. In the **Mouse Mode** menu on the document toolbar, select **Area selection** (see Figure 1.12).

(Figure 1.12)



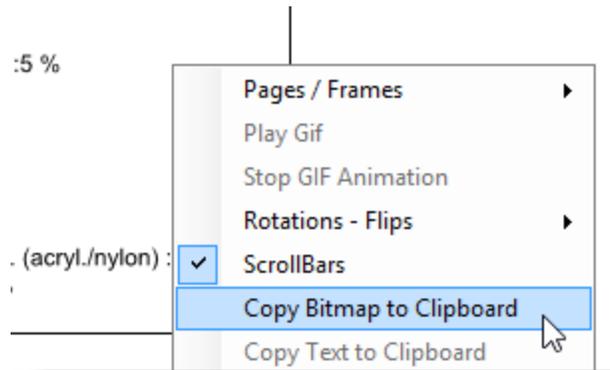
- b. Click and drag to select the area of the document to be copied (see Figure 1.13).

(Figure 1.13)



- c. Right-click the selected area and click **Copy Bitmap to Clipboard** in the right-click menu (see Figure 1.14).

(Figure 1.14)



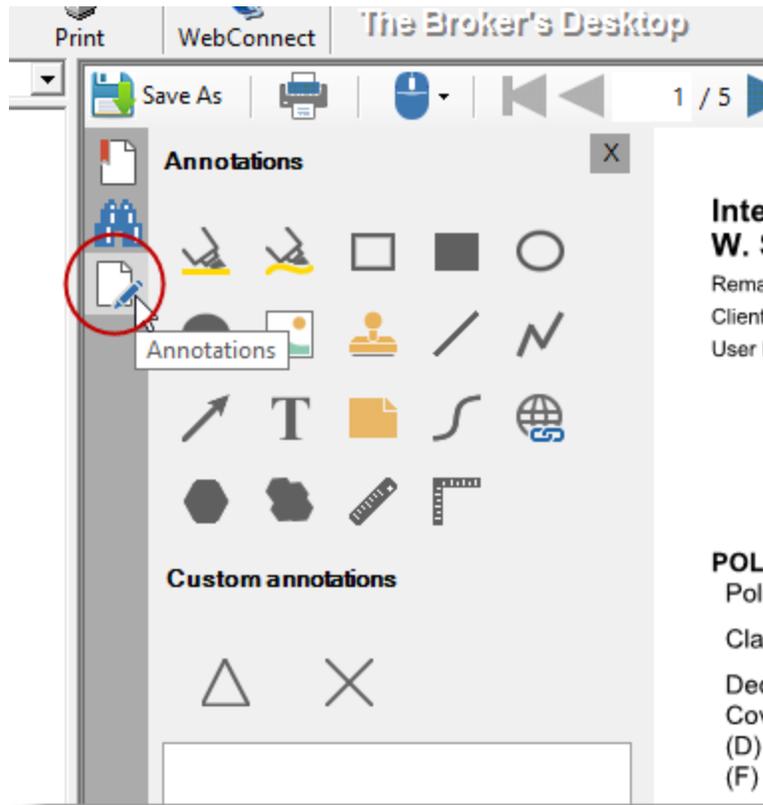
- d. Move to the document where you will be pasting the copied selection, and paste using the right-click option or the Paste function on the document menu bar.
 - o Note that the pasted content will behave and can be formatted as a graphic/picture.

Annotations Feature

Use the **Annotations** feature to add temporary or permanent notes or comments, highlighting, lines, links, or other annotations to PDF documents in TBW/TUW. Annotations can be permanently “burned” onto the file, or saved and loaded later into another PDF document. The Annotations feature can be temporarily “locked” to prevent annotations from being modified or added to a document. Annotated PDF files can be saved in TBW/TUW or to an external location.

Once a PDF document has been opened in the TBW/TUW Document Window, click the **Annotations** button to open the **Annotations pane** (see Figure 1.15). Select the target tool and then mark/add notes to the document as required.

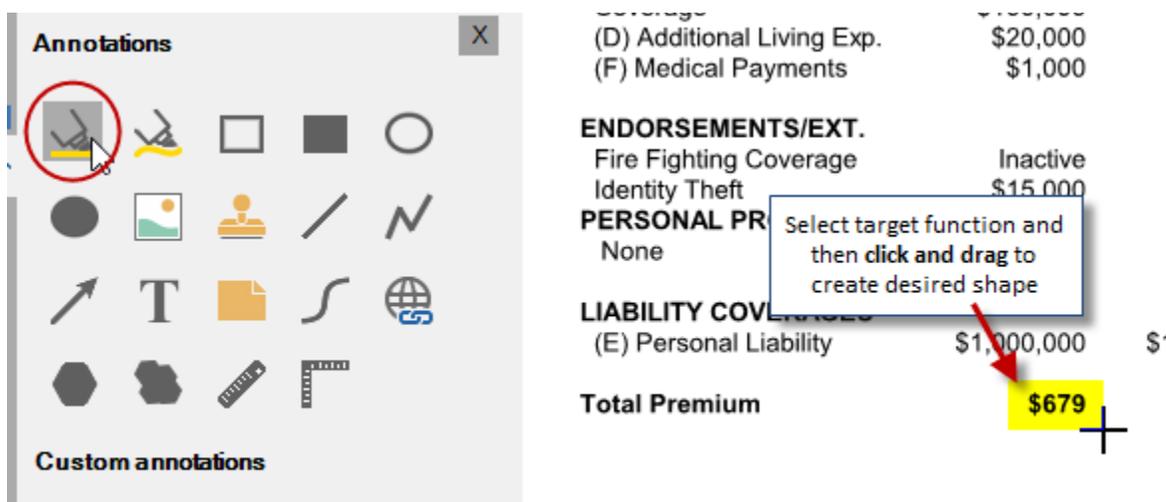
(Figure 1.15)



When using Annotation tools,

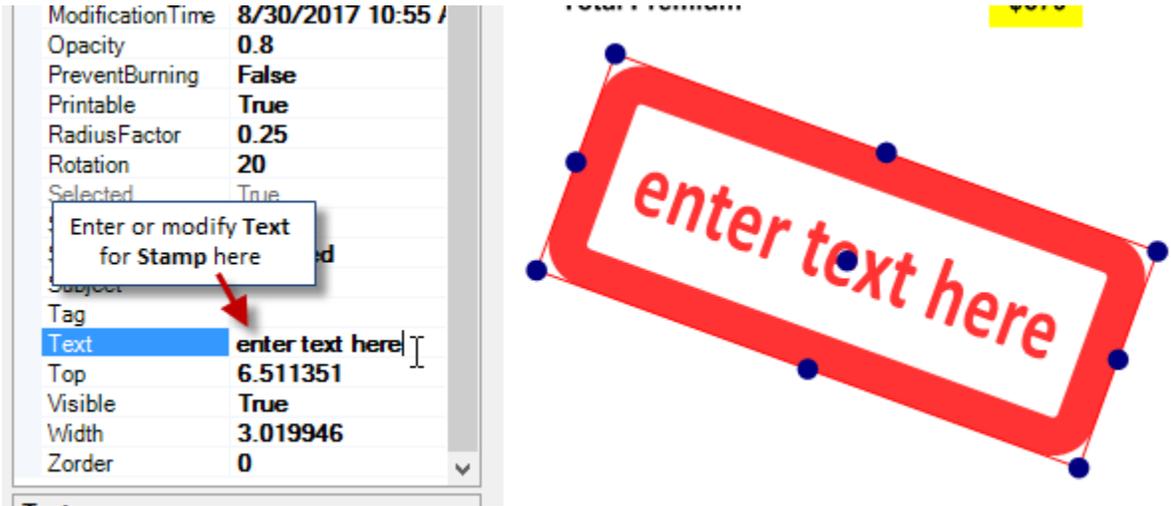
- Click and drag your mouse pointer to create the desired shape (see Figure 1.16).

(Figure 1.16)



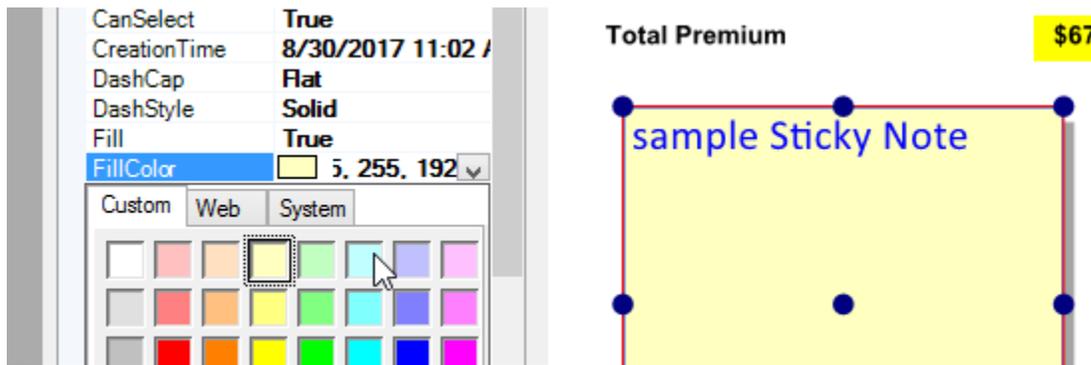
- To add or modify text in the **Text** box or **Sticky Note**, double-click the object and type directly in the shape. Click away from the shape when complete.
 - For the **Rubber Stamp**, select the drawn object and then adjust text in the customization pane (see Figure 1.17).

(Figure 1.17)



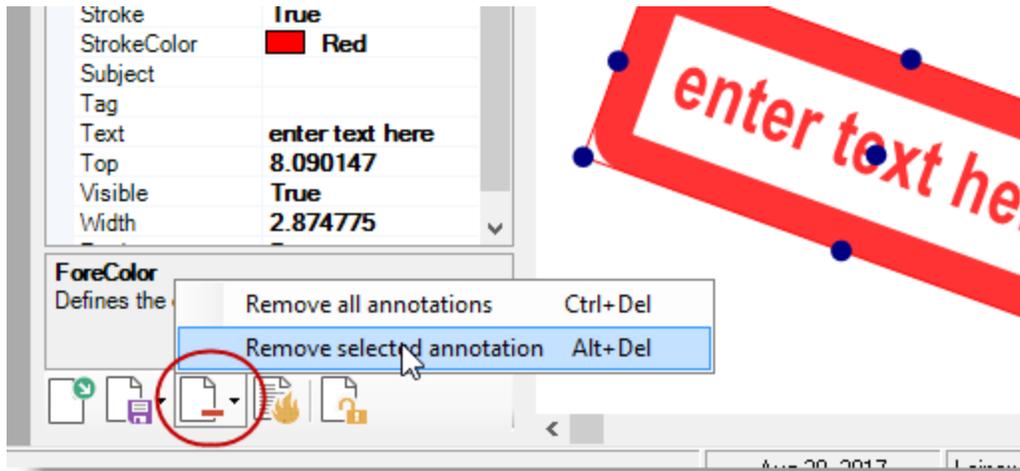
- You can also make changes to color, font, and more for the selected object in the customization pane (see Figure 1.18).

(Figure 1.18)



One or more annotations can be removed from the document, if required. To remove a single annotation, select the object and click **Remove selected annotation** in the **Remove annotations** menu at the bottom of the Annotations pane (see Figure 1.19).

(Figure 1.19)



- To remove all annotations in the document, click **Remove all annotations** in the **Remove annotations** menu.

Save Annotated Documents Internally or Externally

Annotated PDF documents can be saved in TBW/TUW and/or to an external location using the **Save As** button on the PDF toolbar.

- When you save an annotated PDF in TBW/TUW, current annotations will be saved and, the next time the document is opened, annotations can be modified or removed, if required.
- Similarly, when an annotated PDF is saved to an external location, current annotations will be saved. If you import the PDF document back into TBW/TUW, annotations can be modified or deleted as needed.
- **Note:** If you make additional changes to a saved annotated PDF document, you must resave the document (using the Save As button) to save those changes.

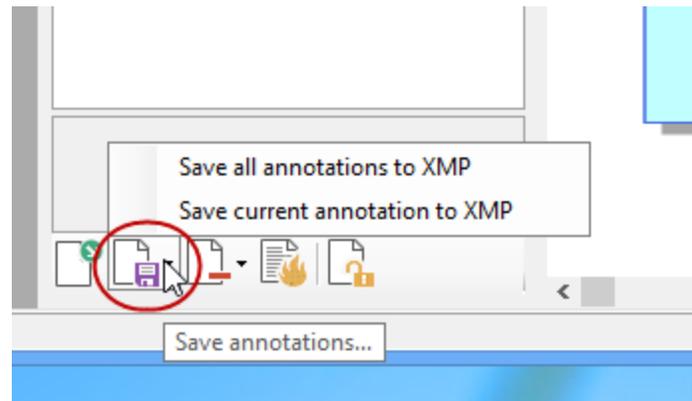
Save and Load Annotations from an XMP File

One or all annotations you have added to a PDF document can be saved to an **XMP file**, ready to import into another PDF document later. This time-saving feature allows you to save and reuse your common annotations, rather than creating them from scratch each time. Note that imported annotations can be modified as required.

The **Save annotations**  and **Load from XMP file**  buttons are found at the bottom of the Annotations pane.

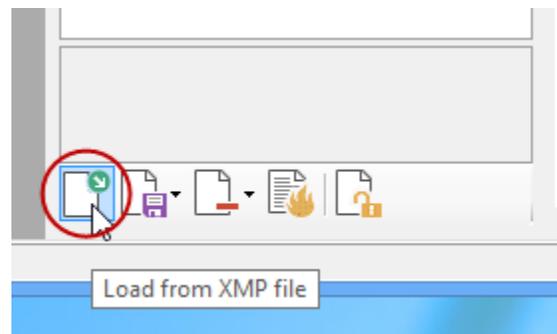
To save annotations in the current document to an XMP file, click the **Save annotations** button (see Figure 1.20) and select to save all or just the currently selected annotation. Then, in the **Save Annotations as XMP** window, enter a file name, select a location to save the file, and click **Save**.

(Figure 1.20)



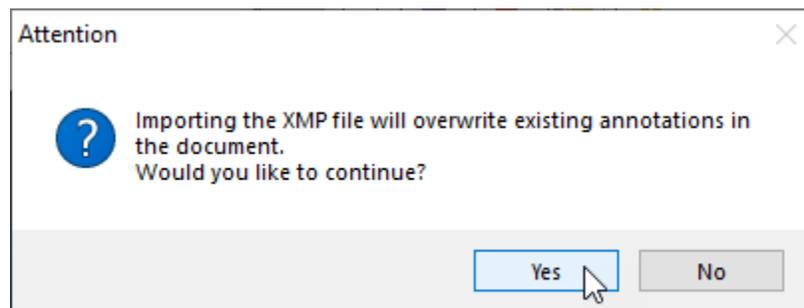
To import saved annotations into the current PDF document, click the **Load from XMP file** button (see Figure 1.21). Then, in the **Load Annotations from XMP File** dialog, find and double-click the target file.

(Figure 1.21)



- **Please note:** When annotations are imported into a document, **any pre-existing annotations will be deleted** (unless they have been burned onto the document). If annotations have already been added to the document, an **Attention** pop-up will display to remind you that existing annotations will be overwritten (see Figure 1.22). Click **Yes** to continue with the import, or click **No** to return to the PDF document without importing the saved annotations.

(Figure 1.22)

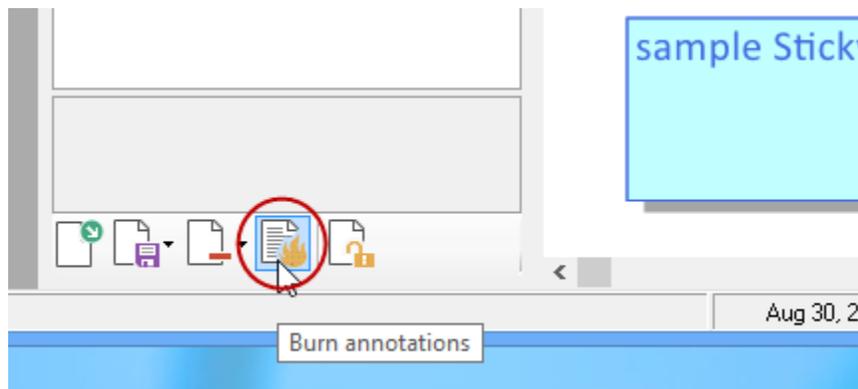


Burn Annotations

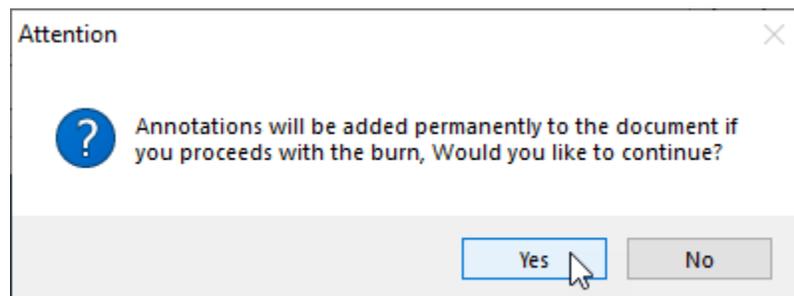
Use the **Burn Annotations** option to add the current annotations permanently to the PDF document. To burn the current annotations to the PDF document, click the **Burn Annotations**  button (see Figure 1.23). An Attention pop-up will display to remind you that the burn function is permanent; click **Yes** if you would like to proceed (see Figure 1.24). Then, once you have saved the PDF file, the annotations will be permanently added to the PDF file.

- **Note:** Once annotations have been burned onto the document and the document has been saved, the annotations cannot be modified or removed. However, additional annotations can be added to the document later, if required.

(Figure 1.23)



(Figure 1.24)

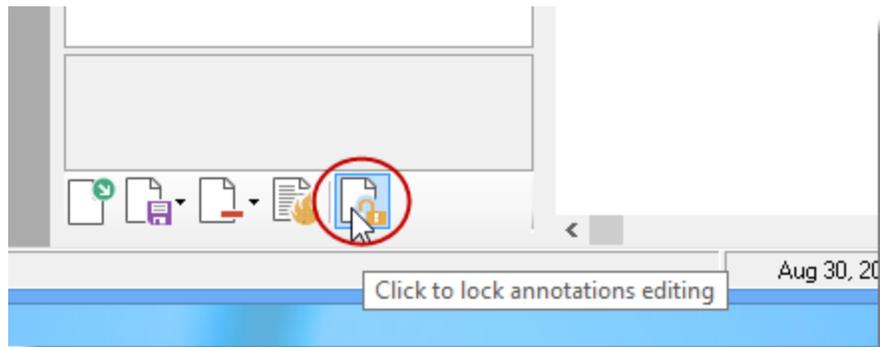


Lock the Annotations Feature

Use the “Lock Annotations Editing” option to temporarily make annotations read-only (so they cannot be moved, modified, or deleted) and prevent any new annotations from being added to PDF documents.

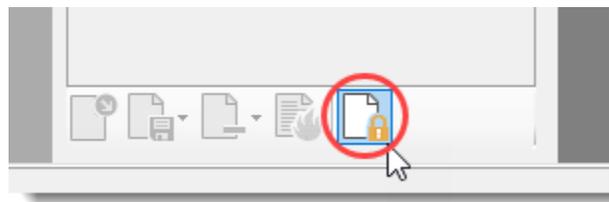
When a PDF document is open in the Document Window, click the **Lock**  button at the bottom of the Annotations pane (see Figure 1.25) to lock the document and ensure existing annotations cannot be modified and no additional annotations can be added.

(Figure 1.25)



Once a document has been locked, the Lock button will change to the “locked” view (see Figure 1.26), and other buttons in the Annotations pane will be inaccessible. If at some point you need to add or edit annotations, simply click the Lock button again to unlock the document.

(Figure 1.26)



Please note:

- A “locked” status is temporary and will not remain in place when TBW/TUW is closed and reopened. Please relock documents as required.
- Locking/unlocking annotations for one PDF file will lock/unlock annotations for all PDF files while the user session is open (i.e. when a PDF document on the Desktop is “locked,” all other PDF documents on the Desktop will automatically be locked, as well).

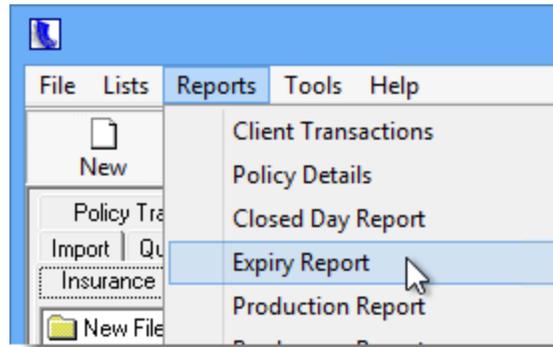
[Return to Contents](#)

2. Account Rep Details in Expiry Report

Two additional columns (**Account Rep** and **AcctRep Eff Date**) have been added to the Expiry Report. These columns will provide details about the most recent Account Representative and the effective date for their assignment to the policy.

To create an Expiry Report, click **Reports, Expiry Report** (see Figure 2.1).

(Figure 2.1)



In the **Expiry Report** window that displays, enter report criteria as required, and then click **View** to generate the report.

Report results will display in the Document Window. Note the new **Account Rep** and **AcctRep Eff Date** columns (see Figure 2.2).

(Figure 2.2)

Pol Num	Producer	Account Rep	AcctRep Eff Date	Sub	Pol Type
JME2233	AC	Patrick Goodall	9/1/2016		HOME
est1122	AC	Pam Cranston	9/1/2016		HOME
JM1212	RC	Roxy Cassidy	9/30/2016		HOME
JM2121	RC	Roxy Cassidy	9/30/2016		HOME
JME1212	AC	Amie Cassidy	10/30/2016		HOME

These new columns (Account Rep and AcctRep Eff Date) will be included when the report is exported to Microsoft Excel; however, please note that the Account Rep and AcctRep Eff Date columns will not be included when the report is printed.

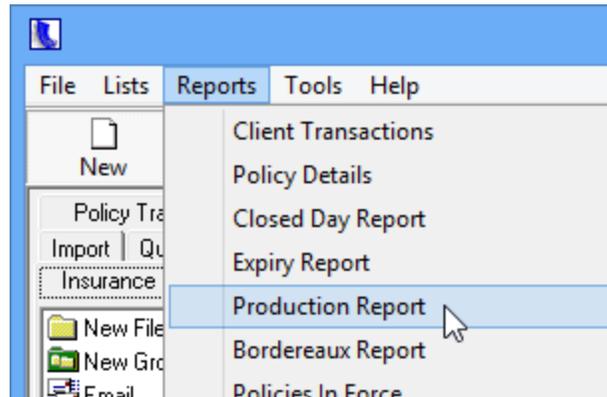
[Return to Contents](#)

3. Account Rep Details in Production Report

The detailed Production Report has been improved with two additional columns: **Account Rep** and **AcctRep Eff Date**. These columns will display the Account Representative effective on the computer date the report is run, as well as the effective date for their assignment to the policy.

To create a Production Report that includes the new Account Rep and AcctRep Eff Date columns, click **Reports, Production Report** (see Figure 3.1).

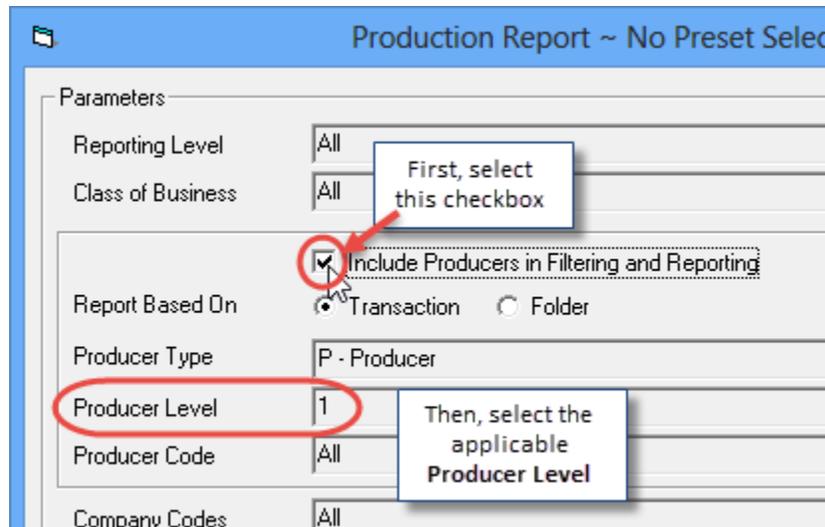
(Figure 3.1)



In the Production Report dialog that displays, select the **Include Producers in Filtering and Reporting** checkbox, and then select a specific **Producer Level** to include the Account Rep Manager for that level in report results (see Figure 3.2).

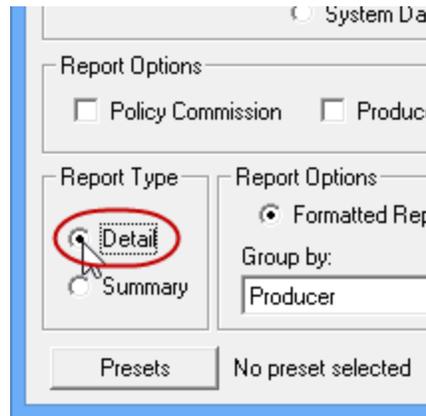
- If the Include Producers in Filtering and Reporting checkbox is not selected, Account Rep Manager details will not be included in the report.
- If all or multiple Producer Levels are selected (rather than just one), Account Rep Manager details will not be included in the report.

(Figure 3.2)



Proceed to enter additional report parameters in the usual way, ensuring **Detail** is selected in the **Report Type** area (see Figure 3.3).

(Figure 3.3)



Click **View** to generate the report, and report results will display in the Document Window. Note the new **Account Rep** and **AcctRep Eff Date** columns (see Figure 3.4).

(Figure 3.4)

WebConnect | The Broker's Desktop

Production Report (including Cancellations) - Company
 Reporting Period: 06/01/2016 - 06/13/2018 (Policy Effective Date)

Code	Producer Code	Broker Prov	Account Rep	AccRep Eff Date
gned)			Lainey Russell	10/27/2017
gned)			Annie Cameron	10/27/2017
		ON		
gned)			Lainey Russell	2/1/2017
gned)			Roxy Cassidy	2/1/2017
		MB	Lainey Russell	2/14/2017
		MB	Roxy Cassidy	2/14/2017

These new columns (Account Rep and AcctRep Eff Date) will be included when the detailed Production Report is exported to Microsoft Excel and when the report is printed.

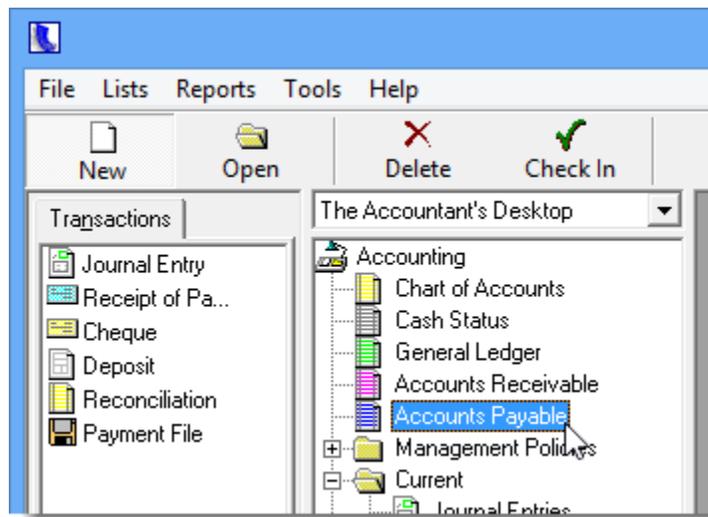
[Return to Contents](#)

4. Pending Payments Optimization

Several enhancements have been made to the Accounts Payable (AP) Pending Payments feature to optimize speed and improve data integrity. Please note, the user workflow for AP Pending Payments has not changed; however, you will notice changes to the grid display.

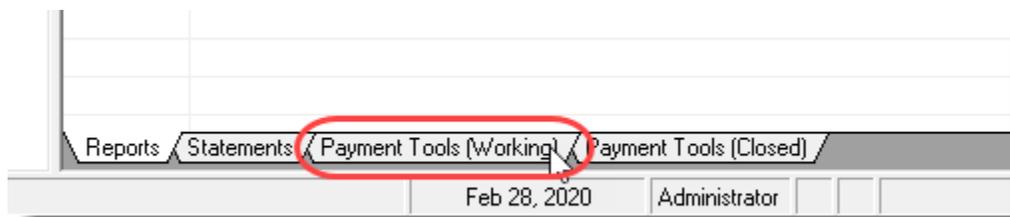
To view pending payment transactions, double-click **Accounts Payable** in the Accounting Tree (see Figure 4.1).

(Figure 4.1)



At the bottom of the screen, select the **Payment Tools (Working)** tab (see Figure 4.2).

(Figure 4.2)



Current pending payments will display in the list, with applicable columns of information provided. Double-click a pending payment in the list to view additional details in a separate window. After you have double-clicked a pending payment, note the following changes in the grid that displays:

- Multi-line transactions will now be rolled up and presented in a single line.
- Previously, the individual detail lines of a transaction could be viewed by clicking the plus (+) sign (see Figure 4.3). Now, the plus sign on transactions has been removed, so you will only see the transaction total, rather than the detail lines (see Figure 4.4).

(Figure 4.3)

	Eff. Date	Acc. Date	Policy Code	Fees	Premium	Comm	Co
Auto	3/4/2020	3/4/2020	AUTO	0.00	(5,023.00)	(884.60)	17
			AUTO		(3,023.00)	(604.60)	20
			UAD		(2,000.00)	(280.00)	14
Home	3/3/2020	3/3/2020	HOME	0.00	(1,925.00)	(385.00)	20
Seasonal	3/4/2020	3/4/2020	SEASONAL	0.00	(191.00)	(38.20)	20

(Figure 4.4)

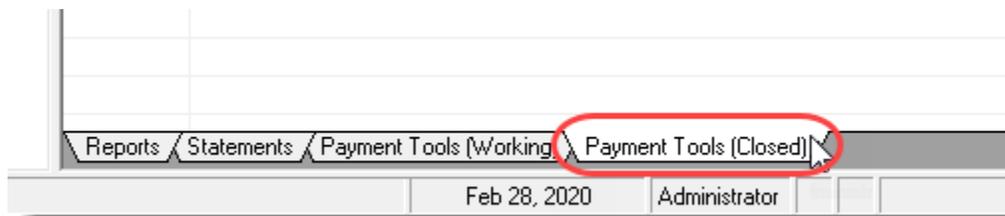
	Eff. Date	Acc. Date	Policy Code	Fees	Premium	Com
Auto	3/4/2020	3/4/2020	AUTO	0.00	(5,023.00)	(884.60)
Home	3/3/2020	3/3/2020	HOME	0.00	(1,925.00)	(385.00)
Seasonal	3/4/2020	3/4/2020	SEASONAL	0.00	(191.00)	(38.20)

Plus (+) sign has been removed

Also, additional steps have been taken to improve the amount of time required to load pending payments. Once the TBW Update Utility has been run, you will notice improvements in this area, particularly when loading pending payments containing very large amounts of data.

Note that the improvements described above are also applicable on the **Payment Tools (Closed)** tab (see Figure 4.5).

(Figure 4.5)



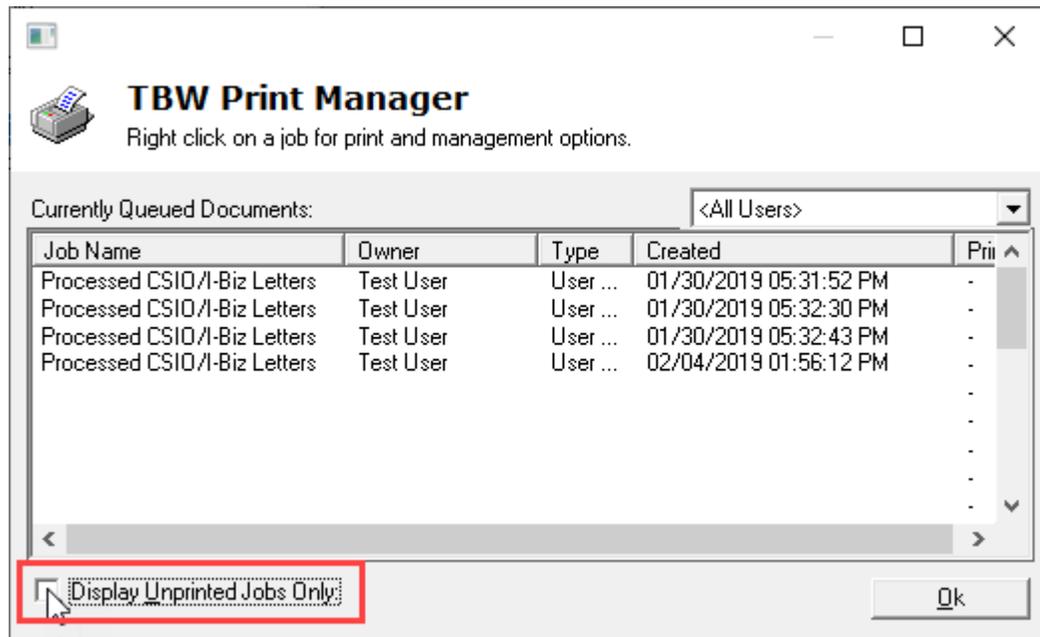
[Return to Contents](#)

5. Storage of Completed Print Jobs

Please note that completed print jobs in TBW/TUW will now be stored for seven days in the print queue in TBW Print Manager. Any completed print jobs older than seven days will automatically be removed from the print queue and the TBW/TUW database.

Print jobs currently in the print queue can be viewed in the TBW Print Manager window. To open Print Manager, click **Tools, Print Manager**. To view any completed print jobs in the list, deselect the **Display Unprinted Jobs Only** checkbox (see Figure 5.1).

(Figure 5.1)



[Return to Contents](#)

6. TBW/TUW Now Only Available Online

Please be aware that offline use is no longer supported for TBW/TUW. With an increasing number of companies providing online rating, an online connection is required to use TBW/TUW effectively. As such, TBW/TUW is now only available online and all TBW/TUW functions now rely on direct database connection.

[Return to Contents](#)

Please share this information with the appropriate TBW and TUW users in your office(s). Once you have reviewed this document, if you have any questions regarding these features or need further assistance in their usage, please contact our Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



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